

Seminole County Visitor Profile & Economic Impact

Year 2001



Produced by:

*Choice Communications Systems Inc
888.530.7780.*

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Background Seminole County Convention and Visitors Bureau has commissioned Choice Communications Systems Inc. to conduct a year-long study of visitors to Seminole County. Contained in this report are the results of the Economic Impact Study and the details of the Visitor Profile Study.

Purpose The purpose of the Economic Impact Study is to determine the impact visitors' spending on Seminole County. The study analyzes the spending habits of the 'overnight visitor' and the 'daytripper'. The purpose of the Visitor Profile Study is to capture key demographic characteristics of the visiting population. The visiting population is defined by anyone over the age of 18 who does not work or live in Seminole County.

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Highlights

Despite the economic slow-down and tragic events of 2001, Seminole County tourism remained strong. The economic impact of tourism in 2001 lagged slightly behind the year 2000 economic impact.

In 2001, Seminole County hosted an estimated 11.4 million visitors whose spending had an economic impact of over \$1.6 billion. Overnight visitors contributed 36% of the economic impact: approximately \$561 million. Daytrippers contributed 64% of the economic impact: approximately \$1 billion.

Visitor spending generated a tax impact over \$18 million which is a slight decrease from the year 2000. Despite the decrease in the tax impact, tourism generated at least *an additional* \$1.4 million in ad valorem taxes specifically for county schools -- a slight increase over last year's \$1.3 million.

Without visitors, every adult in Seminole County would have to pay at least an additional \$81 more in taxes each year to receive the same level of services they currently enjoy.

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Highlights

Lodging expenditures were approximately \$63 million which produced \$1.9 million for the hotel bed tax.

While the number of overnight visitors staying in hotel/motels decreased 2.3%, lodging expenditures remained strong due to a 3% increase in ADR.

Seminole County lodging establishments fared better than Orlando. Orlando lodging establishments saw a 6% decrease in occupancy and a 2% drop in ADR resulting in a 13% drop in RevPAR (Revenue per Available Room).

Employment directly attributed to tourism expenditure is estimated to be slightly over 6,000. An additional 11,000 jobs in all other industries are indirectly affected by tourist spending. Tourism industries, such as, Transportation by Air, Lodging Establishments, and Amusements are all in the top 20 fastest-growing industries in Seminole County. ¹

Orlando Sanford International Airport continues to grow. In 2001, the airport supported 1.2 million passengers which includes a 50% increase in domestic travel.

1. Source: Labor Market Info

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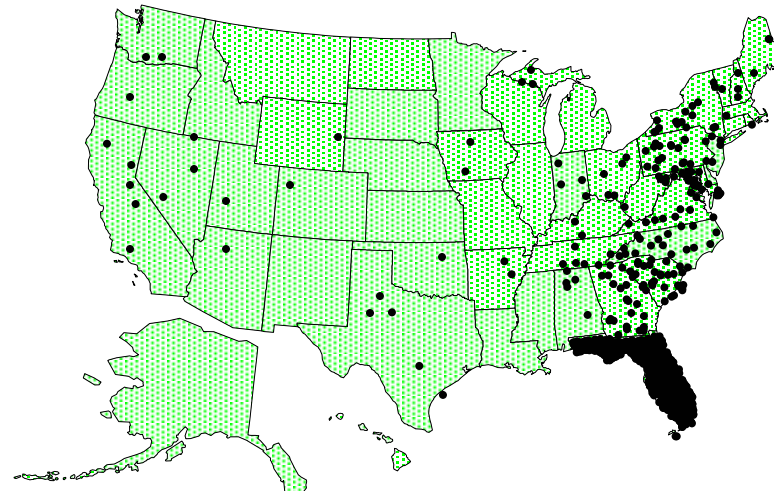
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Sample and Sources

CCSinc conducted in-person interviews of visitors to Seminole County from April 1, 2001 through March 31, 2002. Occupancy rates were obtained from Smith Travel Research and Seminole County CVB for the year 2001. Economic and employment information are obtained from U.S. Department of Commerce, Labor Market Statistics, Florida Agency for Workforce Innovation, Office of Workforce Information Services and the Local Area Unemployment Statistics Program.

U.S. Visitor Origin



%	Region
65%	South
15%	North East
11%	Central
10%	West

Comments

Previous year's data are used for benchmarking and trending. Sample is influenced by Orlando Sanford International Airport. International visitors were 5% of the total sample.

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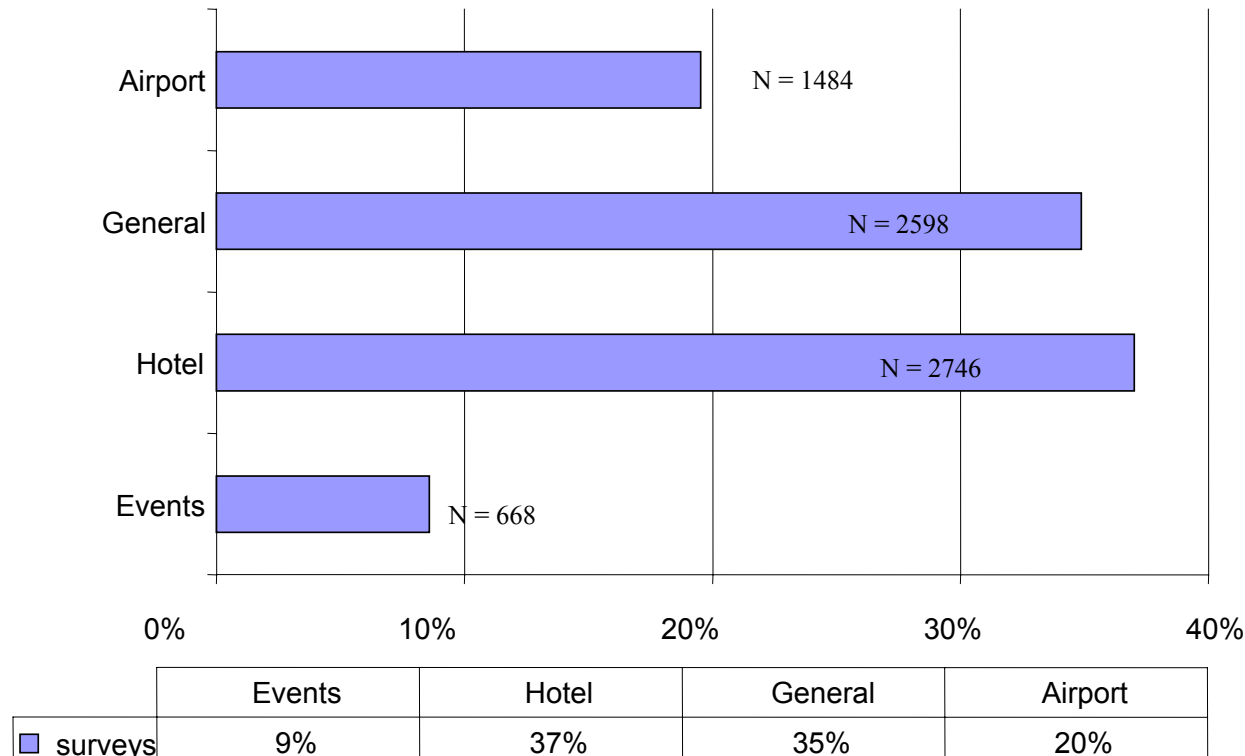
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Location of Interviews Most surveys were conducted in areas throughout Seminole County such as parks (county and state), Downtown Sanford, Central Florida Zoo, special events, and tourist locations (museums, etc.).



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Quantities **For the Economic Impact Study:**

& Number of in-person surveys: 1983

Benchmarks Number of individuals represented (party size considered): 6346

For the Visitor Profile Study:

Number of total surveys (in-person and all other): 2572

Number of individuals represented (party size considered): 7424

Hotel Surveys:

This is only a subset of the Overnight sample because hotel guests are found at all other locations.

Number of hotel surveys: 952

Number of individual represented by hotel surveys: 2190

Benchmarks for Comparison :

National Level Profiles: 1200 -- 2500 individuals

Regional Level Profiles: 1200 individuals

County Level Profiles: 850 - 1200 individuals

Subset Sample (for County): Varies greatly, 250 - 850 individuals

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Definitions

Visitor Types A *visitor* is anyone who does not live or work in Seminole County.

Visitor Types are described below. Note that visitors are categorized by type regardless of the location of the interview. For example, a Hotel Visitor is anyone staying at least one night in a Seminole County hotel. The interview could have taken place at any of the locations: hotels, airport, or general.

Visitor Types

Hotel:	Visitors who are staying at least one night in a Seminole County hotel.
Airport:	Visitors who are flying in or out of the Sanford International Airport, international and domestic flights.
All:	Any individual who visits Seminole County.
Business:	Any individual whose primary trip purpose is for business reasons.

Special Note Note, some visitors may belong in more than one category. The standard error for the estimates: there is a 99% chance the parameter value is within + or - 3% unless noted otherwise.

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Economic Impact

The principle objective of this portion of the research project is to estimate the economic impact on Seminole County by visitors. The economic impact of visitors is defined as their expenditures and their resulting tax impact. CCSinc concentrates on the two major sources of economic impact -- overnight visitors and daytrippers (visitors to Seminole County who do not spend the night).

Methodology Summary

CCSinc's methodology to calculate economic impact of visitors on Seminole County can be summarized in four steps:

Population Estimates: Determine the inventory of hotel rooms, their occupancy rates, number of overnight visitors, and number of daytrippers.

Expenditure Characteristics: Determine visitors' expenditures and characteristics by interviews conducted on a random sample of visitors to Seminole County.

Primary Economic Impact -- Expenditures: Project expenditures to total visitor population by key groups -- overnight and daytripper; using the characteristics captured in the intercept surveys as well as those characteristics that are appended through geo-demographic methods, CCSinc projects expenditures by type of visitor to the total visiting population.

Secondary Economic Impact -- Tax Impact: Using expenditure information by type of visitor, CCSinc uses Seminole County specific multipliers from the RIMSII¹ to determine Economic Impact.

Special Note:

¹RIMS II Source: Regional Economic Analysis Division, Bureau of Economic Analysis, U.S. Department of Commerce.

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Surveys were conducted in Seminole County using hand-held computers. Surveys were conducted with adults 18 years or older on a random basis at various sites throughout the County. The intercept surveys captured key details about the visitors, such as, expenditures by category, length of stay, location and type of accommodation, size of party, and demographic information. Average expenditures are then determined for different expenditure categories for different types of visitors. These expenditures by categories are then scaled to the total visiting population for the period of one year.

CCSinc uses '*multipliers*' from the RIMS II model to determine Economic Impact for Seminole County. The Regional Input-Output Modeling System (RIMS II) was prepared by the Regional Economic Analysis Division, Bureau of Economic Analysis of the U.S. Department of Commerce. Model estimates were obtained specifically for Seminole County.

To calculate total Economic Impact of visitors, CCSinc first determines a primary economic impact -- expenditures by category (Lodging, Restaurants, and Retail) for all visitors. In addition to these expenditures, a secondary economic impact is determined based on the fact that for every dollar expended there is a ripple effect throughout the economy. Every visitor dollar spent creates expansion in terms of sales, employment, etc. because hotels, restaurants, and other local businesses then purchase additional goods and services from other businesses. These additional dollars that are spent because of the business that visitors bring to the county are termed the secondary economic impact. Economic Impact is the sum of the primary economic impact (expenditures) plus the secondary economic impact.

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Economic Impact

\$1.6 Billion in Economic Impact
\$18.2 Million in Tax Impact
\$1 Billion in Expenditures

** We estimate a 'swing' value of plus or minus 6%.*

Therefore, the estimated Economic Impact of visitors on Seminole County is expressed in a range of dollar values:

	Low	Estimate	High
Economic Impact	\$1,504,000,000	\$1,600,000,000	\$1,696,000,000
Tax Impact	\$17,076,018	\$18,165,976	\$19,255,935
Expenditures	\$940,000,000	\$1,000,000,000	\$1,060,000,000

Details of the Economic Impact

Daytrippers contribute approximately 64% of the Economic Impact but only 56% of the Tax Impact.

	Economic Impact	Tax Impact	Percent EI	Percent TI
Overnight	\$560,699,396	\$8,031,935	36%	44%
Daytripper	\$994,352,816	\$10,134,041	64%	56%

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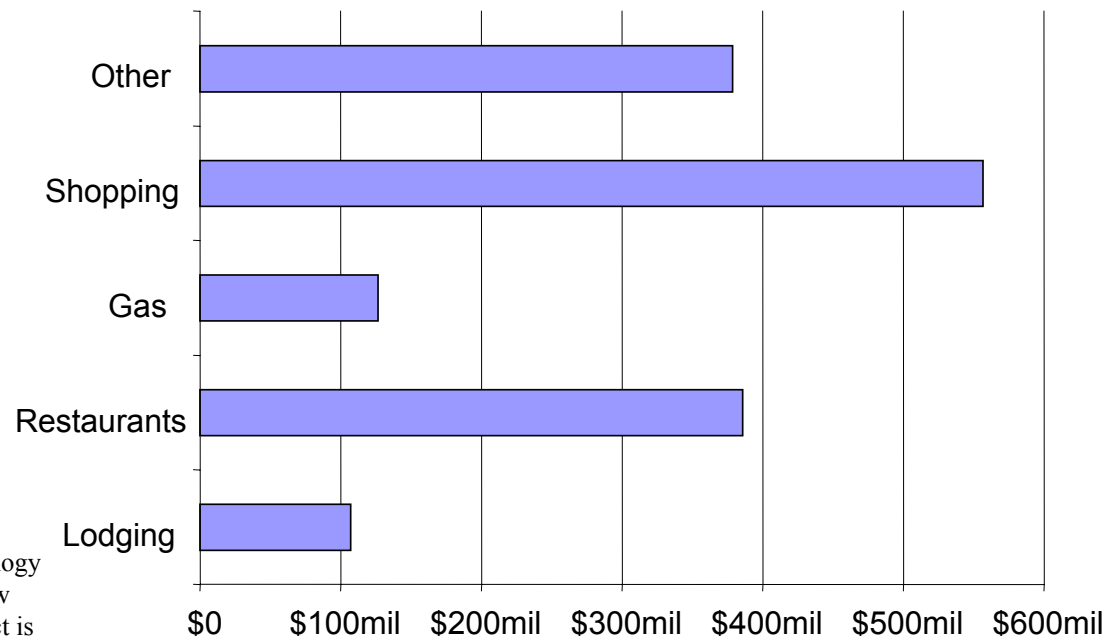
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Economic Impact by Category

Economic Impact is measured by major Retail Categories: Lodging, Restaurants, Gas, Shopping, and Other. Shopping contributes the largest economic impact.

Category	Total EI
Lodging	\$107,239,577
Restaurant	\$385,702,845
Gas	\$126,760,176
Shopping	\$556,674,675
Other	\$378,674,939
Total	\$1,555,052,212

Total Economic Impact



Special Note:
See the Methodology
section for how
Economic Impact is
calculated.

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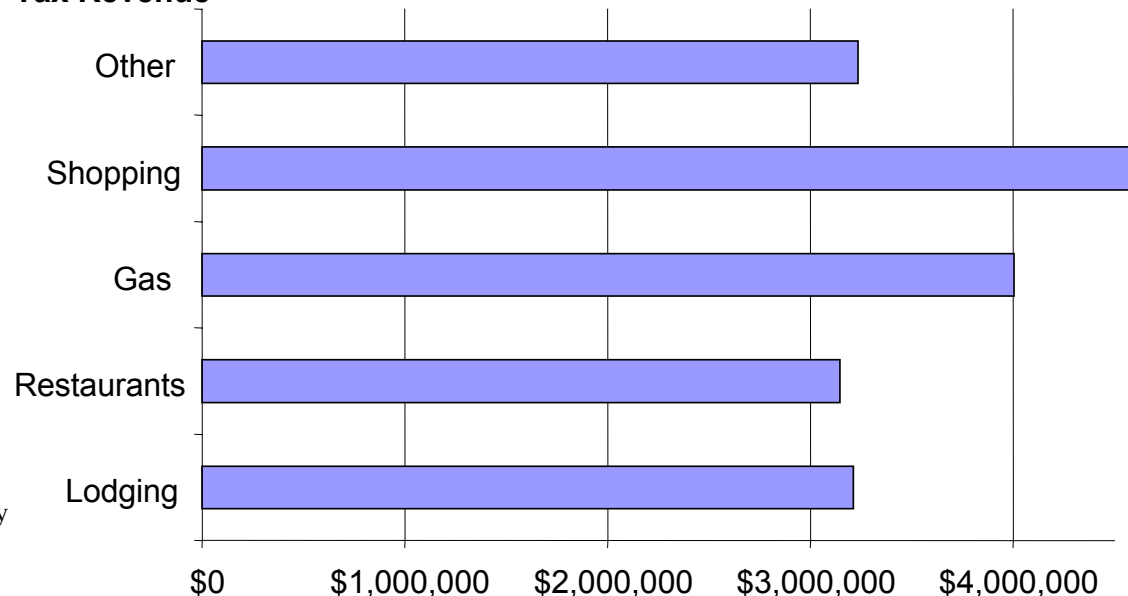
Tax Impact by Category

Tax Impact is a measure of tax dollars generated by the *Economic Impact* of each category (lodging, restaurants, etc). The category of Shopping brought the largest tax impact to Seminole County.

Total expenditures in Lodging is approximately \$63.3 million. The 3% 'bed tax' produces \$1.9 million in tax revenue for Seminole County.

Category	Total TI
Lodging	\$3,211,572
Restaurant	\$3,145,998
Gas	\$4,003,267
Shopping	\$4,571,685
Other	\$3,233,454
Total	\$18,165,976

Tax Revenue



Special Note:

See the Methodology section for how Economic Impact is calculated.

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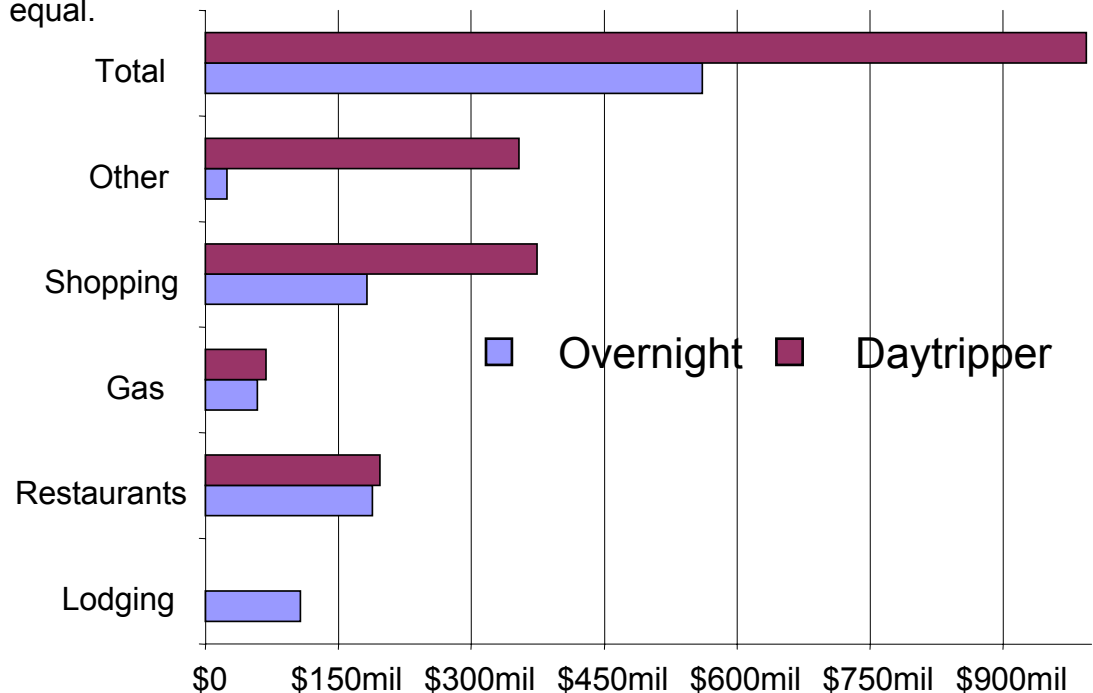
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Economic Impact

Economic Impact Comparison

Overnight and Daytrippers have different Economic Impact. There are 7 million more daytrippers than there are overnight visitors. However, the economic impact of gas and restaurants are about equal.

	Overnight EI	Daytripper EI
Lodging	\$107,239,577	\$0
Restaurants	\$188,345,737	\$197,357,107
Gas	\$58,198,186	\$68,561,990
Shopping	\$182,428,005	\$374,246,670
Other	\$24,487,890	\$354,187,049
Total	\$560,699,396	\$994,352,816



Special Note:
See the Methodology section for how Economic Impact is calculated.

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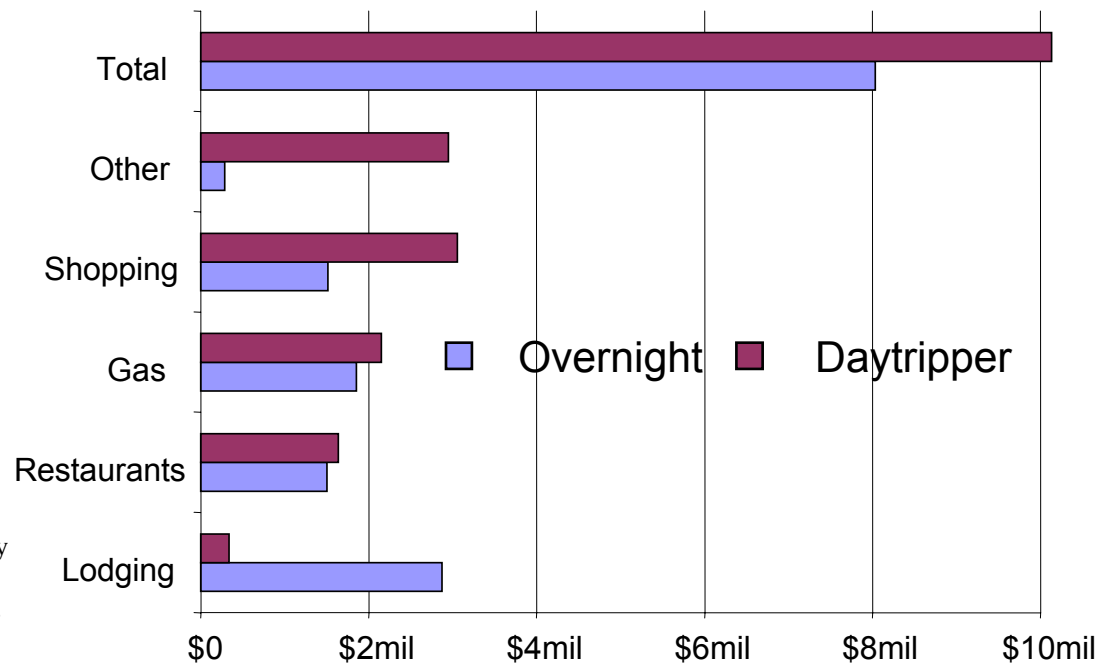
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Tax Impact Comparison

Tax Impact is a measure of tax dollars generated by the *Economic Impact* of each category (lodging, restaurants, etc). While Daytrippers contribute 64% of the Economic Impact, they only contribute 56% of the Tax Impact.

	Overnight TI	Daytripper TI
Lodging	\$2,873,271	\$338,302
Restaurants	\$1,504,646	\$1,641,352
Gas	\$1,854,276	\$2,148,991
Shopping	\$1,514,733	\$3,056,953
Other	\$285,010	\$2,948,443
Total	\$8,031,935	\$10,134,041



Special Note:
See the Methodology
section for how
Economic Impact is
calculated.

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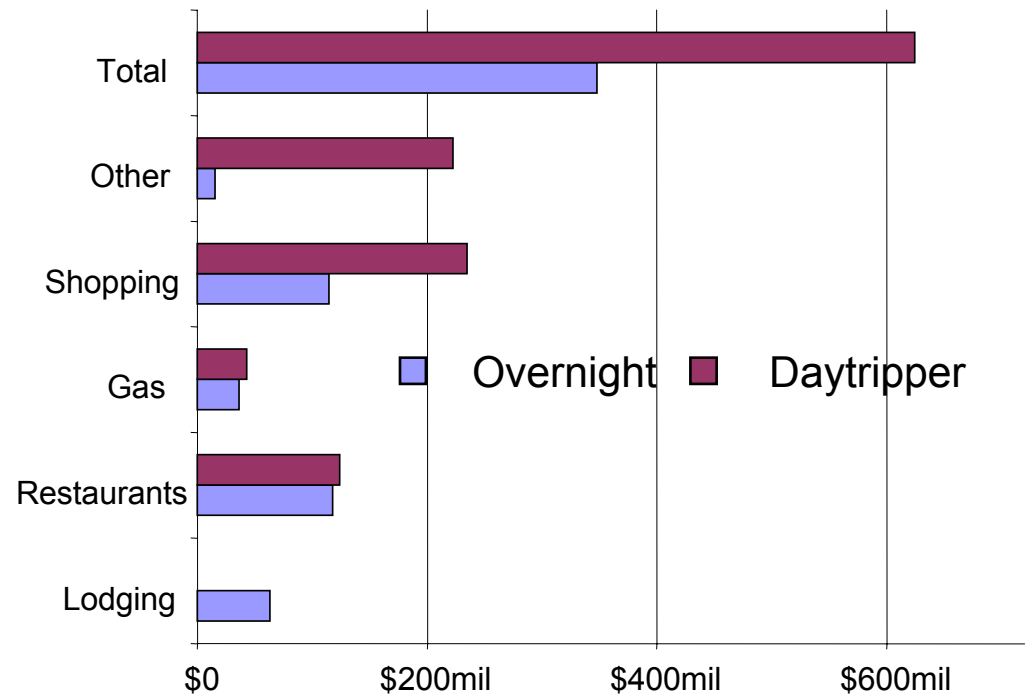
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Expenditures There were nearly \$1billion spent by visitors in Seminole County.

	Overnight Exp	Daytripper Exp
Lodging	\$63,115,518	\$0
Restaurar	\$118,270,479	\$123,929,110
Gas	\$36,545,172	\$43,053,055
Shopping	\$114,554,477	\$235,005,758
Other	\$15,377,011	\$222,409,450
Total	\$347,862,657	\$624,397,373



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Expenditures per Party While staying in Seminole County, the average person per day spent approximately per category:

**Expenditures by Category
(Per Person)**

Lodging	\$43
Restaurants	\$18
Gasoline	\$6
Shopping	\$27
Other	\$8

Population Details It is estimated that approximately 2 million visitors spent the night in Seminole County in 2001 (with 1 million spending the night in a hotel). Daytrippers are estimated at 9.4 million. Therefore, total visitors are estimated at 11.4 million.

Population estimates are from Smith Travel Research's Accommodation data, Seminole County's inventory of hotel/motels, and primary survey data from CCSinc.

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Visitor Profile Introduction

In 2001, the United States' tourism market was greatly affected by two major factors: the decline of the economy and the terror attacks on September 11th. Although Seminole County tourism industry fared quite well compared to the rest of the nation, Seminole County's tourism population experienced change due to these factors. The change in tourism began in the spring of 2001 and was evident by mid-summer that the economy was taking a toll on the traveling public. The total visiting population declined in 2001 compared to the previous year. The following discussion of increases and decreases refer to the change in population mix of target segments -- not the absolute increase or decrease in population.

The 2001 visitor compared to 2000 visitor: As tourism declined, it is interesting to note which market segments continued to visit Seminole County despite the economic and safety concerns -- an older, more wealthier visitor came to Seminole County in the year 2001. While all target segments declined overall, the business segment continued to visit while the leisure segment declined at a greater rate. The leisure travelers were more likely to spend the night with friends or family instead of a hotel. The length-of-stay decreased for both groups. Those business visitors who travel to Seminole County for the purposes of 'training' declined in number, and therefore, the percentage of extended-stay business travelers also declined.

The growth of Sanford Orlando International Airport positively influenced the number of business travelers to Seminole County. A growing number stay overnight in hotels in Seminole County and do business within Seminole and the surrounding counties. Leisure visitors traveling to attend or participate in Special Events captured a larger share of the daytripper and overnight market. Many of these visitors traveled in large groups.

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All Visitors Comparison

The percentage of overnight visitors did not change from the previous year. Overnight guests were more like to stay with Friends or Family instead of a hotel. The average night stay decreased in all segments including the training segment whose stays are typically five nights or greater. The average party size increased due to a greater share of tourists traveling as part of groups -- in the leisure segment, the groups attended or participated in special events, and in the business segment, these groups attended seminars/conventions. Business travelers new to Seminole County were more likely to be traveling and doing business outside the county -- they chose Seminole County over other surrounding counties primarily due to price coupled with Seminole's 'central location'.

Characteristics	ALL VISITORS		
	Year One Final	Year Two Final	Year Three Final
Overnight	11%	17%	18%
<i>Hotel</i>	72%	67%	50%
<i>Avg. Night Stay</i>	2.4	2.8	2.3
Party Size			
<i>Avg. Size</i>	3.6	2.9	3.2
<i>Traveling with Children</i>	19%	22%	26%
Trip Purpose			
<i>Business</i>	10%	11%	35%
<i>Leisure</i>	90%	89%	65%
Business Reason			
<i>Client or Prospect Meeting</i>	57%	44%	36%
<i>Convention or Seminar</i>	1%	5%	26%
<i>Training, Other</i>	42%	51%	39%
Part of Larger Trip			
<i>No</i>	69%	74%	67%
<i>Yes</i>	31%	26%	33%

**Special Note:
Avg. Night Stay
does not include
overnights of more
than 14 nights.*

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All Visitors Comparison

The average time for *planning a trip* increased, however, more visitors were making last minute arrangements. For those that researched their trip, most collected information for almost a month before deciding to actually travel. The increase in time is due to the feelings of uncertainty regarding the economy and the safety of travel. Although nationally the use of travel agents is declining, the 2001 Seminole County tourist was more likely to use a travel agent as compared to last year. This is attributed to the increase in percentage of the wealthier traveler segment and the increase in the segment of corporate travel -- both of these segments are more likely to use a travel agent. Group travel to sporting events captured a larger portion of the leisure travelers.

**Special Note:
Trip activities now
allows for multiple
responses.*

Characteristics	ALL VISITORS		
	Year One Final	Year Two Final	Year Three Final
Trip Planning			
Both, Male & Female Together	64%	63%	43%
Avg. Time	20 days	12 days	32 days
Requested Information	< 1%	1%	1%
Travel Arrangements			
Myself	63%	63%	54%
Assistant or Co-worker	15%	17%	13%
Travel Agent	7%	7%	19%
Other	15%	13%	14%
Trip Activities*			
Nature parks or recreational areas	21%	32%	33%
Shopping	22%	72%	37%
Sports event	1%	5%	12%
General	54%	25%	18%

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All Visitors Comparison

Awareness about Seminole County and its attractions decreased. This is primarily due to the increase of 'first time' visitors, as well as, an increase in the percentage of business travelers -- who tend not to research leisure activities prior to arriving. Almost all had a positive image of Seminole before leaving with most complaints targeted at traffic and congestion. Some visitors voiced their concern of Seminole's suburban growth and the conflict this growth will have on the image of a nature destination.

Characteristics	ALL VISITORS		
	Year One Final	Year Two Final	Year Three Final
Loyalty			
Return Visitor	70%	83%	77%
First Time	29%	17%	23%
Awareness			
Yes	74%	90%	63%
No	26%	10%	37%
Image			
None Before Visit	NA	55%	15%
Changed to 'Good'	NA	95%	91%
Heard by			
Advertisement	6%	7%	14%
Articles in newspaper/magazine	2%	2%	12%
Travel agent	1%	1%	1%
Relative/friends or 'word of mouth'	64%	79%	48%
Travel guides or books	1%	1%	12%
Web site	0%	2%	10%
Airlines	0%	1%	0%
Don't Remember	1%	0%	1%
Other	25%	7%	0%

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All Visitors Comparison

How an individual became aware of Seminole County changed in 2001. Awareness due to advertising doubled because of the shift in the demographic make-up of the visiting population. Although 'word-of-mouth' remains the most likely way an individual hears about Seminole County, a greater percentage of individuals heard through printed media, such as, advertisements and articles. Additionally, the internet continues to grow as an important and strategic tool in communicating and advertising with tourists.

Continued ...

Characteristics	ALL VISITORS		
	Year One Final	Year Two Final	Year Three Final
Loyalty			
Return Visitor	70%	83%	77%
First Time	29%	17%	23%
Awareness			
Yes	74%	90%	63%
No	26%	10%	37%
Image			
None Before Visit	NA	55%	15%
Changed to 'Good'	NA	95%	91%
Heard by			
Advertisement	6%	7%	14%
Articles in newspaper/magazine	2%	2%	12%
Travel agent	1%	1%	1%
Relative/friends or 'word of mouth'	64%	79%	48%
Travel guides or books	1%	1%	12%
Web site	0%	2%	10%
Airlines	0%	1%	0%
Don't Remember	1%	0%	1%
Other	25%	7%	0%

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All Visitors Comparison

In 2001, the demographic profile of the tourist changed. The visitor is far more likely to use the internet for both home and leisure. In general, Seminole County saw a older/wealthier leisure traveler and business traveler.

Characteristics	ALL VISITORS		
	Year One Final	Year Two Final	Year Three Final
Demographics			
Children at Home	33%	33%	22%
Internet			
Yes	52%	54%	78%
No	48%	46%	22%
Marital Status			
Single	18%	15%	32%
Married	82%	85%	68%
Age			
18-24	8%	5%	6%
25-34	35%	27%	17%
35-44	30%	21%	25%
45-54	16%	23%	22%
55-64	10%	23%	14%
65-74	1%	1%	11%
75+	0%	1%	2%
Income			
Below \$25,000	7%	2%	7%
\$25,000 to \$49,999	36%	45%	23%
\$50,000 to \$74,999	38%	36%	24%
\$75,000 to \$84,999	11%	12%	7%
\$85,000 to \$99,999	3%	1%	7%
\$100,000 or Greater	1%	3%	21%

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Trip Characteristics

The average night stay for hotel guests barely increased. The average party size and those traveling with children gained in percentage primarily due to two distinct groups -- tourists traveling in groups for special events and long-stay business travelers who have family visit them during a portion of the stay. There was a larger mix of business visitors in 2001 staying for a variety of reasons. The Training segment saw a decrease in market share while those attending seminars and conventions increased their market share. Many of the business segment traveled both inside and outside Seminole County to conduct business/attend meetings. Compared to last year, there was an increase in leisure travelers that were more likely to have Seminole as their primary destination.

**Special Note:
Avg. Night Stay
does not include
overnights of more
than 14 nights.*

Characteristics	HOTEL VISITORS		
	Year One Final	Year Two Final	Year Three Final
Overnight	100%	100%	100%
<i>Hotel</i>	100%	100%	100%
<i>Avg. Night Stay</i>	1.5	2.3	2.4
Party Size			
<i>Avg. Size</i>	2.5	2.4	2.9
<i>Traveling with Children</i>	14%	10%	18%
Trip Purpose			
<i>Business</i>	49%	51%	56%
<i>Leisure</i>	51%	49%	44%
<i>Business Reason</i>			
<i>Client or Prospect Meeting</i>	35%	30%	46%
<i>Convention or Seminar</i>	4%	6%	41%
<i>Training, Other</i>	62%	65%	13%
<i>Part of Larger Trip</i>			
<i>No</i>	35%	45%	67%
<i>Yes</i>	65%	55%	33%

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Hotel Visitors

Planning and Activities

The percentage of tourists 'shopping' as their primary activity dropped from the previous year. However, shopping still remains the most popular non-work activity. In 2001, tourists were more like to visit the parks and recreational areas and attend special events compared to previous years. This year's hotel visitor was more likely to use a travel agent or book their reservations through a web portal. Information and research time grew for comparison shopping ('looking for deals'). Most business travelers thought Seminole County was "central" and "a good deal", however, many complained about traffic. To note, there was a decrease in the "Disney/Orlando diversion traveler" -- those that travel to Orlando theme parks, yet stay in Seminole County.

Characteristics	HOTEL VISITORS		
	Year One Final	Year Two Final	Year Three Final
Trip Planning			
Both, Male & Female Together	72%	58%	39%
Avg. Time	16.2 Days	18 Days	28 Days
Requested Information	*	*	1%
Travel Arrangements			
Myself	52%	62%	51%
Assistant or Co-worker	28%	17%	14%
Travel Agent	14%	9%	21%
Other	7%	13%	14%
Trip Activities			
Nature parks or recreational areas	4%	13%	20%
Shopping	17%	79%	47%
Sports event	1%	3%	16%
General	79%	5%	18%

**Special Note:
Response too small to
measure with
confidence..*

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Hotel Visitors

Loyalty and Awareness

The 2001 hotel visitor was more likely to be a return visitor. A greater percentage of Seminole County hotel guests recall advertising or articles about Seminole County before they arrived. Compared to last year, a greater percentage used the internet to obtain information about Seminole County and its lodging options. Because of the increase in advertising awareness and return visitors, tourists had an image of Seminole County before arriving. Many thought the advertising image was truthful to the area. Once again, concern was voiced about the growth of Seminole and the impact on its 'nature and heritage' image.

Characteristics	HOTEL VISITORS		
	Year One Final	Year Two Final	Year Three Final
Loyalty			
Return Visitor	37%	45%	74%
First Time	62%	55%	26%
Awareness			
Yes	52%	62%	54%
No	48%	38%	46%
Image			
None Before Visit	NA	72%	17%
Changed to 'Good'	NA	84%	89%
Heard by			
Advertisement	4%	4%	18%
Articles in newspaper/magazine	3%	2%	8%
Travel agent	2%	6%	1%
Relative/friends or 'word of mouth'	76%	69%	42%
Travel guides or books		2%	12%
Web site	1%	8%	14%
Airlines	1%	6%	1%
Don't Remember	1%	2%	2%
Other	11%	0%	0%

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Hotel Visitors

Demographics

The percentage of internet users amongst the hotel segment continues to increase. The 2001 hotel visitor was wealthier and older than the previous year.

Characteristics	HOTEL VISITORS		
	Year One Final	Year Two Final	Year Three Final
Demographics			
Children at Home	34%	33%	36%
Internet			
Yes	45%	73%	83%
No	55%	27%	17%
Marital Status			
Single	21%	36%	27%
Married	79%	64%	73%
Age			
18-24	2%	7%	2%
25-34	25%	23%	14%
35-44	29%	24%	26%
45-54	24%	29%	28%
55-64	18%	13%	15%
65-74	1%	1%	11%
75+	0%	0%	2%
Income			
Below \$25,000	2%	5%	3%
\$25,000 to \$49,999	25%	34%	13%
\$50,000 to \$74,999	44%	26%	21%
\$75,000 to \$84,999	20%	17%	9%
\$85,000 to \$99,999	8%	5%	9%
\$100,000 or Greater	1%	11%	30%

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Airport Visitors

Trip Characteristics

Although the percentage of Domestic visitors staying in Seminole County decreased, the number of domestic visitors that flew through Sanford Orlando Airport grew by 60%. The Domestic segment had a significant increase in business travel. A greater percentage of the domestic traveler stated that Seminole County was their primary destination. This is evident in the business segment. Of note, more international visitors were traveling with children.

Characteristics	International Year Two 2000	International Year Three 2001	Domestic Year Two 2000	Domestic Year Three 2001
Overnight	1%	2%	22%	12%
<i>Hotel</i>	*	75%	50%	6%
<i>Avg. Night Stay</i>	1.0	1.0	3.0	1.7
Party Size				
<i>Avg. Size</i>	3.1	3.0	1.7	3.2
<i>Traveling with Children</i>	0%	2%	11%	13%
Trip Purpose				
<i>Business</i>	1%	4%	1%	63%
<i>Leisure</i>	99%	96%	99%	37%
Business Reason				
<i>Client or Prospect Meeting</i>	*	*	*	24%
<i>Convention or Seminar</i>	*	*	*	24%
<i>Training, Other</i>	*	*	*	52%
Part of Larger Trip				
<i>No</i>	2%	6%	22%	60%
<i>Yes</i>	98%	94%	78%	40%

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Planning and Activities

Despite a decrease, shopping remains the number one non-work activity. The Domestic traveler is more likely to make their own travel arrangements -- quite often using the internet. A greater percentage of visitors, including international visitors, requested information about visiting Seminole County before arriving.

Characteristics	International Year Two 2000	International Year Three 2001	Domestic Year Two 2000	Domestic Year Three 2001
Trip Planning				
Both, Male & Female Together	62%	14%	33%	8%
Avg. Time	25 Days	29 Days	11 Day	21 Days
Requested Information	<1%	6%	<1%	1%
Travel Arrangements				
Myself	*	*	*	41%
Assistant or Co-worker	*	*	*	13%
Travel Agent	*	*	*	29%
Other	*	*	*	17%
Trip Activities				
Nature parks or recreational areas	3%	37%	25%	25%
Shopping	5%	49%	72%	47%
Sports event	0%	0%	3%	11%
General	0%	15%	5%	17%

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Airport Visitors

Loyalty and Awareness

2001 saw an increase in the percentage of return visitors. Awareness of Seminole County and its attractions increased for international visitors. Because the domestic segment had a larger mix of business travelers, awareness about leisure attractions decreased. 'Word-of-mouth' still tends to be the most popular way visitors learn about Seminole County. However, advertising had a greater influence than it had in previous years.

Characteristics	International Year Two 2000	International Year Three 2001	Domestic Year Two 2000	Domestic Year Three 2001
Loyalty				
Return Visitor	20%	53%	19%	65%
First Time	80%	47%	81%	35%
Awareness				
Yes	13%	35%	78%	44%
No	87%	65%	22%	56%
Image				
None Before Visit	95%	72%	85%	23%
Changed to 'Good'	93%	96%	82%	87%
Heard by				
Advertisement	19%	23%	1%	11%
Articles in newspaper/magazine	5%	3%	15%	13%
Travel agent	15%	13%	0%	2%
Relative/friends or 'word of mouth'	21%	23%	62%	48%
Travel guides or books	15%	12%	0%	15%
Web site	18%	26%	8%	10%
Airlines	7%	0%	14%	0%
Don't Remember	0%	0%	0%	0%
Other	0%	0%	0%	0%

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Airport Visitors

Demographics The international market saw an increase in singles traveling where the domestic segment saw an increase in married travelers. There was a strong increase in internet users in the international segment.

Characteristics	International Year Two 2000	International Year Three 2001	Domestic Year Two 2000	Domestic Year Three 2001
Demographics				
Children at Home	27%	41%	8%	38%
Internet				
Yes	55%	81%	80%	86%
No	45%	19%	20%	14%
Marital Status				
Single	17%	40%	56%	32%
Married	83%	60%	44%	68%
Age				
18-24	5%	10%	15%	2%
25-34	28%	13%	20%	16%
35-44	36%	33%	22%	27%
45-54	22%	30%	24%	26%
55-64	8%	10%	20%	17%
65-74	1%	3%	0%	9%
75+	0%	0%	0%	2%
Income				
Below \$25,000	12%	11%	27%	4%
\$25,000 to \$49,999	24%	15%	15%	15%
\$50,000 to \$74,999	33%	37%	33%	19%
\$75,000 to \$84,999	15%	11%	11%	8%
\$85,000 to \$99,999	8%	4%	7%	9%
\$100,000 or Greater	7%	19%	7%	28%

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Addendum

Gas Taxes that are generated by direct expenditures on gasoline sales and are directed back to Seminole County comes to a total of \$3.7 million dollars :

Overnight	Daytripper	Total
\$1,681,078	\$1,980,441	\$3,661,518